

5.2	<p>Goals and Objectives. Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low-income and very low-income, and extremely low-income families for the next five years. Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan.</p> <p>Goal 1: Expand the supply of assisted housing. Objective: Leverage private or other public funds to create additional housing opportunities. Objective: Acquire or build units or developments. Progress: Completed construction of Gulf Breeze Apartments, a mixed finance development of 171 units (including 85 replacement ACC units). Completed acquisition of a new site size to accommodate both the balance of public housing replacement program plus additional affordable housing units. Working with developer partner on design and financing issues for Phase II.</p> <p>Goal 2: Improve the quality of assisted housing. Objective: Improve public housing management (PHAS score). Objective: Improve voucher management (SEMAP score). Objective: Demolish or dispose of obsolete public housing. Objective: Provide replacement public housing. Progress: Complete construction of Gulf Breeze Apartments and related demolition/disposition activities required for mixed finance development. Submitted disposition application for Marion Avenue site and listed for sale, with sale proceeds intended to build replacement public housing units on recently acquired site.</p> <p>Goal 3: Provide an improved living environment Objective: Implement measures to de-concentrate poverty by bringing higher income public housing households into lower income developments. Objective: Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments. Objective: Designate developments or buildings for particular resident groups (elderly, persons with disabilities). Progress: Completed construction of Gulf Breeze mixed finance project which promotes greater location choice for public housing residents.</p> <p>Goal 4: Ensure equal opportunity and affirmatively further fair housing. Objective: Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion, national origin, sex, familial status, and disability. Objective: Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion, national origin, sex, familial status, and disability. Objective: Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required. Progress: Fair housing training was conducted for all staff. The training session was open to the community as well.</p> <p>Goal 5: Create partnerships with other service providers to assist child and adult victims of domestic violence Objective: Implement plan for Resident Service Coordinator to partnership with local service providers that assist families and individuals who are victims of domestic abuse, sexual assault or stalking. Objective: Pursue Memorandum of Understanding with local domestic abuse agency that will provide a resource for tenant families and individuals. Objective: Identify those tenants at risk and refer to local agencies that can assist in addressing their needs. Objective: Work with local police to quickly respond to abuse incidents and address immediate threat. Progress: Have referred recent victim to local domestic abuse agency and worked with police to remove abusive individual and eliminate threat to household.</p>
6.0	<p>PHA Plan Update</p> <p>(a) Identify all PHA Plan elements that have been revised by the PHA since its last Annual Plan submission:</p> <p>The last Annual Plan was submitted in January 2008. An amendment was submitted in October 2008 and approved 11/04/08. The amendment added the intent to submit a disposition application for PGHA's the former Riverview Gardens public housing site (54 units) destroyed by Hurricane Charley in 2004. The amendment noted PGHA's intent to acquire an alternate site to develop replacement public housing units through the mixed finance process, and PGHA's intent to submit an acquisition proposal to HUD when a suitable alternative site is identified. HUD approved the PGHA's acquisition proposal and a site was acquired in June 2009. HUD approval of the disposition request is still pending.</p> <p>(b) Identify the specific location(s) where the public may obtain copies of the 5-Year and Annual PHA Plan. For a complete list of PHA Plan elements, see Section 6.0 of the instructions.</p> <p>The public may view copies of the 5-Year and Annual PHA Plan at the PGHA administrative offices located at 340 Gulf Breeze Avenue, Punta Gorda, FL.</p>

7.0	<p>Hope VI, Mixed Finance Modernization or Development, Demolition and/or Disposition, Conversion of Public Housing, Homeownership Programs, and Project-based Vouchers. <i>Include statements related to these programs as applicable.</i></p> <p>Punta Gorda Housing Authority received a Disaster Capital Grant to replace 154 public housing units destroyed by Hurricane Charley in August 2004. The former Gulf Breeze/Dolphin Villas public housing site has been redeveloped through the mixed finance process into Gulf Breeze Apartments. This new development which was completed in November 2008 contains 171 units, of which 85 are replacement public housing units. PGHA received disposition approval for the Gulf Breeze site prior to the mixed finance closing (the site is owned by PGHA and ground leased to the rental partnership which includes a PGHA affiliate as a non-managing general partner).</p> <p>As noted in Section 6.0, PGHA has submitted a disposition request for the former Riverview Gardens site in order to sell the site at fair market value. Pursuant to PGHA's HUD approved acquisition plan, PGHA has acquired an alternate development site for its Phase II replacement program which will consist of senior rental housing. PGHA intends to submit an Elderly-Only Designated Housing Plan in conjunction with the Phase II development consistent with the stated objectives of the PGHA's 5-Year Plan.</p>																																																						
8.0	<p>Capital Improvements. Please complete Parts 8.1 through 8.3, as applicable.</p>																																																						
8.1	<p>Capital Fund Program Annual Statement/Performance and Evaluation Report. As part of the PHA 5-Year and Annual Plan, annually complete and submit the <i>Capital Fund Program Annual Statement/Performance and Evaluation Report</i>, form HUD-50075.1, for each current and open CFP grant and CFFP financing.</p> <p>(See attached Capital Fund Program tables)</p>																																																						
8.2	<p>Capital Fund Program Five-Year Action Plan. As part of the submission of the Annual Plan, PHAs must complete and submit the <i>Capital Fund Program Five-Year Action Plan</i>, form HUD-50075.2, and subsequent annual updates (on a rolling basis, e.g., drop current year, and add latest year for a five year period). Large capital items must be included in the Five-Year Action Plan.</p> <p>(See attached Five-Year Action Plan table)</p>																																																						
8.3	<p>Capital Fund Financing Program (CFFP). <input type="checkbox"/> Check if the PHA proposes to use any portion of its Capital Fund Program (CFP)/Replacement Housing Factor (RHF) to repay debt incurred to finance capital improvements.</p>																																																						
9.0	<p>Housing Needs. Based on information provided by the applicable Consolidated Plan, information provided by HUD, and other generally available data, make a reasonable effort to identify the housing needs of the low-income, very low-income, and extremely low-income families who reside in the jurisdiction served by the PHA, including elderly families, families with disabilities, and households of various races and ethnic groups, and other families who are on the public housing and Section 8 tenant-based assistance waiting lists. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location.</p> <p><u>Housing Needs of Families on the PHA's Waiting Lists</u></p> <table border="1"> <thead> <tr> <th></th><th><u>Section 8 Tenant-Based</u></th><th><u>Public Housing</u></th></tr> </thead> <tbody> <tr> <td>Waiting List Total</td><td>579</td><td>221</td></tr> <tr> <td>Extremely Low Income (<+30% AMI)</td><td>360</td><td>146</td></tr> <tr> <td>Very Low Income (>30% but <50% AMI)</td><td>194</td><td>55</td></tr> <tr> <td>Low Income (>50% but <80% AMI)</td><td>25</td><td>20</td></tr> <tr> <td>Families With Children</td><td>434</td><td>164</td></tr> <tr> <td>Elderly Families</td><td>43</td><td>26</td></tr> <tr> <td>Families With Disabilities</td><td>102</td><td>31</td></tr> <tr> <td>White</td><td>348</td><td>172</td></tr> <tr> <td>Black</td><td>225</td><td>49</td></tr> <tr> <td>Indian/Asian</td><td>4</td><td>0</td></tr> <tr> <td>Mixed</td><td>1</td><td>35</td></tr> <tr> <td>Characteristics By Bedroom Size</td><td></td><td></td></tr> <tr> <td>1BR</td><td>146</td><td>86</td></tr> <tr> <td>2BR</td><td>232</td><td>82</td></tr> <tr> <td>3BR</td><td>162</td><td>44</td></tr> <tr> <td>4BR</td><td>33</td><td>9</td></tr> <tr> <td>5+BR</td><td>3</td><td>0</td></tr> </tbody> </table>		<u>Section 8 Tenant-Based</u>	<u>Public Housing</u>	Waiting List Total	579	221	Extremely Low Income (<+30% AMI)	360	146	Very Low Income (>30% but <50% AMI)	194	55	Low Income (>50% but <80% AMI)	25	20	Families With Children	434	164	Elderly Families	43	26	Families With Disabilities	102	31	White	348	172	Black	225	49	Indian/Asian	4	0	Mixed	1	35	Characteristics By Bedroom Size			1BR	146	86	2BR	232	82	3BR	162	44	4BR	33	9	5+BR	3	0
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9.1	<p>Strategy for Addressing Housing Needs. Provide a brief description of the PHA’s strategy for addressing the housing needs of families in the jurisdiction and on the waiting list in the upcoming year. Note: Small, Section 8 only, and High Performing PHAs complete only for Annual Plan submission with the 5-Year Plan.</p> <p><u>Need: Shortage of affordable housing for all eligible populations.</u></p> <p>Strategy 1: Maximize the number of affordable units available to the PHA within its current resources by:</p> <ul style="list-style-type: none"> • Seek replacement of public housing units lost to the inventory through mixed finance development; • Maintain or increase Section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction; • Maintain or increase Section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration. <p>Strategy 2: Increase the number of affordable housing units by:</p> <ul style="list-style-type: none"> • Leverage affordable housing resources in the community through the creation of mixed-finance housing. <p><u>Need: Specific Family Types: Families at or below 30% of median.</u></p> <p>Strategy 1: Target available assistance to families at or below 30% of AMI:</p> <ul style="list-style-type: none"> • Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing. • Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based Section 8 assistance • Adopt rent policies to support and encourage work. <p><u>Need: Specific Family Types: Families at or below 50% of median</u></p> <p>Strategy 1: Target available assistance to families at or below 50% of AMI:</p> <ul style="list-style-type: none"> • Adopt rent policies to support and encourage work. <p>Reasons for selecting strategies:</p> <ul style="list-style-type: none"> • Funding constraints. • Staffing constraints.
10.0	<p>Additional Information. Describe the following, as well as any additional information HUD has requested.</p> <p>(a) Progress in Meeting Mission and Goals. Provide a brief statement of the PHA’s progress in meeting the mission and goals described in the 5-Year Plan.</p> <p>PGHA and its developer partner completed construction of Gulf Breeze Apartments in November 2008. This mixed finance development of 171 units, of which 85 are replacement public housing units. Financial close-out activities are ongoing, but full conversion to permanent financing cannot occur prior to July 2010 pursuant to terms of the bond documents. PGHA continues to work with its redevelopment team to implement Phase II of the replacement program and has acquired (pursuant to a HUD approved acquisition proposal) a replacement site.. Financing applications have been submitted but all necessary funding is not yet in place. Due to the difficulty of obtaining 9% tax credit financing, the developer is pursuing a bond/4% credit financing plan. Approval of PGHA’s disposition application for the former Riverview Gardens site is still pending.</p> <p>(b) Significant Amendment and Substantial Deviation/Modification. Provide the PHA’s definition of “significant amendment” and “substantial deviation/modification”</p> <p>PGHA considers a Substantial Deviation from 5-Year Plan to include:</p> <ul style="list-style-type: none"> • The addition of new activities that do not otherwise further PGHA’s stated mission or further the goals set forth in the current 5-Year Capital Plan. • Insufficient budget authority from HUD necessitating the need to terminate program activities. • An exception to this definition will be made from any new activities that are adopted to reflect changes in HUD regulatory requirements or as a result of a declared emergency (such changes will not be considered a substantial deviation by PGHA). <p>PGHA considers a Significant Amendments or Modifications to the Annual Plan to include:</p> <ul style="list-style-type: none"> • Significant changes to rent or admissions policies or organization of the waiting lists. • Addition of new program initiatives not included in the current 5-Year Capital Plan. • Demolition or disposition, designation, or conversion activities not currently identified in the plan or otherwise approved by HUD. • An exception to this definition will be made for any of the above that are adopted to reflect changes in HUD regulatory requirements or as a result of a declared emergency (such changes will not be considered significant amendments by PGHA).

11.0	<p>Required Submission for HUD Field Office Review. In addition to the PHA Plan template (HUD-50075), PHAs must submit the following documents. Items (a) through (g) may be submitted with signature by mail or electronically with scanned signatures, but electronic submission is encouraged. Items (h) through (i) must be attached electronically with the PHA Plan. Note: Faxed copies of these documents will not be accepted by the Field Office.</p> <ul style="list-style-type: none"> (a) Form HUD-50077, <i>PHA Certifications of Compliance with the PHA Plans and Related Regulations</i> (which includes all certifications relating to Civil Rights) (b) Form HUD-50070, <i>Certification for a Drug-Free Workplace</i> (PHAs receiving CFP grants only) (c) Form HUD-50071, <i>Certification of Payments to Influence Federal Transactions</i> (PHAs receiving CFP grants only) (d) Form SF-LLL, <i>Disclosure of Lobbying Activities</i> (PHAs receiving CFP grants only) (e) Form SF-LLL-A, <i>Disclosure of Lobbying Activities Continuation Sheet</i> (PHAs receiving CFP grants only) (f) Resident Advisory Board (RAB) comments. Comments received from the RAB must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the recommendations and the decisions made on these recommendations. (g) Challenged Elements (h) Form HUD-50075.1, <i>Capital Fund Program Annual Statement/Performance and Evaluation Report</i> (PHAs receiving CFP grants only) (i) Form HUD-50075.2, <i>Capital Fund Program Five-Year Action Plan</i> (PHAs receiving CFP grants only)
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This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced 5-Year and Annual PHA Plans. The 5-Year and Annual PHA plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission and strategies for serving the needs of low-income and very low-income families. This form is to be used by all PHA types for submission of the 5-Year and Annual Plans to HUD. Public reporting burden for this information collection is estimated to average 12.68 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Privacy Act Notice. The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality

Annual Statement/Performance and Evaluation Report
Capital Fund Program, Capital Fund Program Replacement Housing Factor and
Capital Fund Financing Program

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 4/30/2011

Part I: Summary					
PHA Name: Punta Gorda Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14S5060501-09 Replacement Housing Factor Grant No: Date of CFFP: _____			FFY of Grant: 2009 FFY of Grant Approval:
Type of Grant <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no: 1) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 9/30/2009 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost ¹	
		Original	Revised ²	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations (may not exceed 20% of line 21) ³				
3	1408 Management Improvements				
4	1410 Administration (may not exceed 10% of line 21)	5,709.00	4,503.85	4,503.85	4,503.85
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement	51,378.00	52,583.15	52,583.15	52,583.15
10	1460 Dwelling Structures				
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Non-dwelling Structures				
13	1475 Non-dwelling Equipment				
14	1485 Demolition				
15	1492 Moving to Work Demonstration				
16	1495.1 Relocation Costs				
17	1499 Development Activities ⁴				
18a	1501 Collateralization or Debt Service paid by the PHA				
18ba	9000 Collateralization or Debt Service paid Via System of Direct Payment				
19	1502 Contingency (may not exceed 8% of line 20)				
20	Amount of Annual Grant: (sum of lines 2 – 19)	57,087	57,087	57,087	57,087
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Section 504 Activities				
23	Amount of line 20 Related to Security – Soft Costs				
24	Amount of line 20 Related to Security – Hard Costs				
25	Amount of line 20 Related to Energy Conservation Measures				

¹ To be completed for the Performance and Evaluation Report.


² To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

³ PHAs with under 250 units in management may use 100% of CFP Grants for operations.

⁴ RHF funds shall be included here.

Annual Statement/Performance and Evaluation Report
 Capital Fund Program, Capital Fund Program Replacement Housing Factor and
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Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost ¹	
		Original	Revised ²	Obligated	Expended
Signature of Executive Director 		Date 3/8/10		Signature of Public Housing Director Date	

[illegible]

² To be completed for the Performance and Evaluation Report.

PHA Name:

Federal FFY of Grant:

Reasons for Revised Target Dates ¹[illegible]

¹ Obligation and expenditure end dated can only be revised with HUD approval pursuant to Section 9j of the U.S. Housing Act of 1937, as amended.

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
Expires 4/30/2011

² To be completed for the Performance and Evaluation Report.

PHA Name:

Reasons for Revised Target Dates ¹

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Annual Statement/Performance and Evaluation Report
Capital Fund Program, Capital Fund Program Replacement Housing Factor and
Capital Fund Financing Program

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 4/30/2011

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PHA Name: Punta Gorda Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P060501-09 Replacement Housing Factor Grant No: Date of CFFP: _____			FFY of Grant: 2009 FFY of Grant Approval:
Type of Grant <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 9/30/2009 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost ¹	
		Original	Revised ²	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations (may not exceed 20% of line 21) ³				
3	1408 Management Improvements				
4	1410 Administration (may not exceed 10% of line 21)	44,734		0	0
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures				
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Non-dwelling Structures				
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19	1502 Contingency (may not exceed 8% of line 20)				
20	Amount of Annual Grant: (sum of lines 2 – 19)	44,734		0	0
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Section 504 Activities				
23	Amount of line 20 Related to Security – Soft Costs				
24	Amount of line 20 Related to Security – Hard Costs				
25	Amount of line 20 Related to Energy Conservation Measures				

¹ To be completed for the Performance and Evaluation Report.

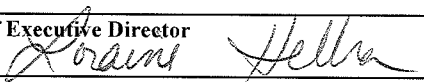
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Annual Statement/Performance and Evaluation Report
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Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost ¹	
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Signature of Executive Director 		Date 3/8/10		Signature of Public Housing Director Date	

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² To be completed for the Performance and Evaluation Report.

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
Expires 4/30/2011

[illegible]

² To be completed for the Performance and Evaluation Report.

PHA Name:

Federal FFY of Grant:

All Fund Obligated
(Quarter Ending Date)

All Funds Expended
(Quarter Ending Date)

Reasons for Revised Target Dates ¹

Original Obligation	End Date
1.000000	1.000000
0.999999	0.999999
0.999998	0.999998
0.999997	0.999997
0.999996	0.999996
0.999995	0.999995
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0.999892	0.999892
0.999891	0.999891
0.999890	0.999890
0.999889	0.999889
0.999888	0.999888
0.999887	0.999887
0.999886	0.999886
0.999885	0.999885

Actual Obligation
End Date

Original Expenditure	End Date
----------------------	----------

Actual Expenditure	End Date
1000000	12/31/2000
2000000	12/31/2001
3000000	12/31/2002
4000000	12/31/2003
5000000	12/31/2004
6000000	12/31/2005
7000000	12/31/2006
8000000	12/31/2007
9000000	12/31/2008
10000000	12/31/2009
11000000	12/31/2010
12000000	12/31/2011
13000000	12/31/2012
14000000	12/31/2013
15000000	12/31/2014
16000000	12/31/2015
17000000	12/31/2016
18000000	12/31/2017
19000000	12/31/2018
20000000	12/31/2019
21000000	12/31/2020
22000000	12/31/2021
23000000	12/31/2022
24000000	12/31/2023
25000000	12/31/2024
26000000	12/31/2025
27000000	12/31/2026
28000000	12/31/2027
29000000	12/31/2028
30000000	12/31/2029
31000000	12/31/2030
32000000	12/31/2031
33000000	12/31/2032
34000000	12/31/2033
35000000	12/31/2034
36000000	12/31/2035
37000000	12/31/2036
38000000	12/31/2037
39000000	12/31/2038
40000000	12/31/2039
41000000	12/31/2040
42000000	12/31/2041
43000000	12/31/2042
44000000	12/31/2043
45000000	12/31/2044
46000000	12/31/2045
47000000	12/31/2046
48000000	12/31/2047
49000000	12/31/2048
50000000	12/31/2049
51000000	12/31/2050
52000000	12/31/2051
53000000	12/31/2052
54000000	12/31/2053
55000000	12/31/2054
56000000	12/31/2055
57000000	12/31/2056
58000000	12/31/2057
59000000	12/31/2058
60000000	12/31/2059
61000000	12/31/2060
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63000000	12/31/2062
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67000000	12/31/2066
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69000000	12/31/2068
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71000000	12/31/2070
72000000	12/31/2071
73000000	12/31/2072
74000000	12/31/2073
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76000000	12/31/2075
77000000	12/31/2076
78000000	12/31/2077
79000000	12/31/2078
80000000	12/31/2079
81000000	12/31/2080
82000000	12/31/2081
83000000	12/31/2082
84000000	12/31/2083
85000000	12/31/2084
86000000	12/31/2085
87000000	12/31/2086
88000000	12/31/2087
89000000	12/31/2088
90000000	12/31/2089
91000000	12/31/2090
92000000	12/31/2091
93000000	12/31/2092
94000000	12/31/2093
95000000	12/31/2094
96000000	12/31/2095
97000000	12/31/2096
98000000	12/31/2097
99000000	12/31/2098
100000000	12/31/2099

PHA Name:

Federal FFY of Grant:

[illegible]

Page 6 of 6

PHA 5-YEAR and ANNUAL PLAN

FL060

Attachment

11.0

(f) The Resident Advisory Board met on October 28, 2009 and review the 5-year and Annual Plan with Executive Director. Members were pleased with the goals and direction and no additional comments were received.

(g) No challenged elements

Annual Statement/Performance and Evaluation Report
 Capital Fund Program, Capital Fund Program Replacement Housing Factor and
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226
 Expires 4/30/2011

Part I: Summary					
PHA Name: Punta Gorda Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14D060501-04 Replacement Housing Factor Grant No: Date of CFFP:			FFY of Grant: 2004 FFY of Grant Approval: 2004
Type of Grant <input type="checkbox"/> Original Annual Statement <input checked="" type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 09/30/09 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost ¹	
		Original	Revised ²	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations (may not exceed 20% of line 21) ³				
3	1408 Management Improvements				
4	1410 Administration (may not exceed 10% of line 21)	\$ 450,000.00		\$ 450,000.00	\$ 220,754.62
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$5,199,747.00		\$5,199,747.00	\$4,414,751.09
8	1440 Site Acquisition				
9	1450 Site Improvement	\$1,738,553.00		\$1,738,533.00	\$1,616,564.00
10	1460 Dwelling Structures	\$6,625,152.00		\$6,625,152.00	\$6,314,555.00
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Non-dwelling Structures	\$ 590,300.00		\$ 590,300.00	\$ 590,300.00
13	1475 Non-dwelling Equipment				
14	1485 Demolition	\$ 542,923.00		\$ 542,923.00	\$ 542,923.00
15	1492 Moving to Work Demonstration				
16	1495.1 Relocation Costs	\$ 50,000.00		\$ 50,000.00	\$ 6,201.26
17	1499 Development Activities ⁴				

¹ To be completed for the Performance and Evaluation Report.

² To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

³ PHAs with under 250 units in management may use 100% of CFP Grants for operations.

⁴ RHF funds shall be included here.

Annual Statement/Performance and Evaluation Report
 Capital Fund Program, Capital Fund Program Replacement Housing Factor and
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226
Expires 4/30/2011

Part I: Summary					
PHA Name: Punta Gorda Housing Authority	Grant Type and Number Capital Fund Program Grant No: FL14D060501-04 Replacement Housing Factor Grant No: Date of CFFP:	FFY of Grant:2004 FFY of Grant Approval: 2004			
Type of Grant <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 09/30/09 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost ¹	
		Original	Revised ²	Obligated	Expended
18a	1501 Collateralization or Debt Service paid by the PHA				
18ba	9000 Collateralization or Debt Service paid Via System of Direct Payment				
19	1502 Contingency (may not exceed 8% of line 20)				
20	Amount of Annual Grant:: (sum of lines 2 - 19)	\$15,196,675.00		\$15,196,675.00	\$13,706,048.97
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Section 504 Activities				
23	Amount of line 20 Related to Security - Soft Costs				
24	Amount of line 20 Related to Security - Hard Costs				
25	Amount of line 20 Related to Energy Conservation Measures				
Signature of Executive Director		Date		Signature of Public Housing Director	
				Date	

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² To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

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⁴ RHF funds shall be included here.

Part II: Supporting Pages								
PHA Name: Punta Gorda Housing Authority			Grant Type and Number Capital Fund Program Grant No: FL14D060501-04 CFFP (Yes/ No): Replacement Housing Factor Grant No:			Federal FFY of Grant: 2004		
Development Number Name/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised ¹	Funds Obligated ²	Funds Expended ²	
PHA Wide	PHA Legal (Development Phase)	1410.4		450,000		450,000	220,754.62	ongoing
	Subtotal 1410			450,000		450,000	220,754.62	
PHA Wide	Former Developer Settlement Costs	1430		1,500,000		1,500,000	1,500,000.00	complete
PHA Wide	3rd Party Costs Outside Settlement	1430		1,545		1,545	1,545.00	complete
	Subtotal Sunk Costs (Excl Demo)			1,501,545		1,501,545	1,501,545.00	
PHA Wide	Phase Program Management Services	1430		1,330,000		1,330,000	657,506.09	ongoing
Gulf Breeze/FL060-000003	Phase I Soft Costs	1430		2,254,500		2,254,500	2,254,500.00	complete
PHA Wide	Other Phase Soft Costs	1430		121,989		121,989	1,200.00	ongoing
	Subtotal Phase Soft Costs			2,368,202		2,368,202	2,255,700.00	
	Subtotal 1430			5,199,747		5,199,747	4,414,751.09	
	Site Acquisition							
	Subtotal 1440							
	Site Improvements							
Gulf Breeze/FL060-03	Phase I Site & Infrastructure/ROW	1450		1,616,564		1,616,564	1,616,564.00	complete
PHA Wide	Other Phase Site & Infrastructure	1450		121,989		121,989	0.00	ongoing
	Subtotal 1450			1,738,553		1,738,553	1,616,564.00	

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² To be completed for the Performance and Evaluation Report.

Part II: Supporting Pages								
PHA Name: Punta Gorda Housing Authority			Grant Type and Number Capital Fund Program Grant No: FL14D060501-04 CFFP (Yes/ No): Replacement Housing Factor Grant No:			Federal FFY of Grant: 2004		
Development Number Name/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised ¹	Funds Obligated ²	Funds Expended ²	
	Dwelling Structures							
Gulf Breeze/FL060-03	Phase I - 85 replacement ACC units	1460	85	6,314,555		6,314,555	6,314,555.00	complete
PHA Wide	Other Phase replacement ACC units	1460	42	310,597		310,597	0.00	ongoing
	Subtotal 1460			6,625,152		6,625,152	6,314,555.00	
	Non Dwelling Structures							
Gulf Breeze/FL060-000001	Phase I Community Bldg/PGHA Office	1470	1	590,300		590,300	590,300.00	complete
	Subtotal 1470							
	Demolition							
Gulf Breeze/Dolphin Villas	Abate/Demolish Phase I area (amount included in settlement, other funds)	1485	100	0		0	0.00	
Riverview /FL060-000001	Abate/Demolish Other PH Site	1485	54	542,923		542,923	542,923.00	complete
	Subtotal 1485							
	Relocation							
	Relocate former residents to new dev	1495		50,000		50,000	6,201.26	ongoing
	Subtotal 1495							

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Annual Statement/Performance and Evaluation Report
Capital Fund Program, Capital Fund Program Replacement Housing Factor and
Capital Fund Financing Program

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 4/30/2011

[illegible]

¹ Obligation and expenditure end dated can only be revised with HUD approval pursuant to Section 9j of the U.S. Housing Act of 1937, as amended.

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Capital Fund Program—Five-Year Action Plan

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 4/30/2011

Part I: Summary						
PHA Name/Number		Locality (City/County & State)			<input type="checkbox"/> Original 5-Year Plan	<input type="checkbox"/> Revision No:
A.	Development Number and Name	Work Statement for Year 1 FFY 2010	Work Statement for Year 2 FFY 2011	Work Statement for Year 3 FFY 2012	Work Statement for Year 4 FFY 2013	Work Statement for Year 5 FFY 2014
B.	Physical Improvements Subtotal	Annual Statement	0	0	0	0
C.	Management Improvements		0	0	0	0
D.	PHA-Wide Non-dwelling Structures and Equipment					
E.	Administration					
F.	Other					
G.	Operations		44,738	44,738	44,738	44,738
H.	Demolition					
I.	Development					
J.	Capital Fund Financing – Debt Service					
K.	Total CFP Funds					
L.	Total Non-CFP Funds					
M.	Grand Total	44,738	44,738	44,738	44,738	44,738

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 4/30/20011

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Capital Fund Program—Five-Year Action Plan

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 4/30/2011

Part II: Supporting Pages – Physical Needs Work Statement(s)						
Work Statement for Year 1 FFY _____	Work Statement for Year 2 _____ FFY 2011			Work Statement for Year: 3 _____ FFY 2012		
	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost
See						
Annual	Not applicable		0	Not applicable		0
Statement						
	Subtotal of Estimated Cost		\$ 0	Subtotal of Estimated Cost		\$ 0

Part II: Supporting Pages – Physical Needs Work Statement(s)						
Work Statement for Year 1 FFY _____	Work Statement for Year 4 _____ FFY 2013			Work Statement for Year: 5 _____ FFY 2014		
	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost
See	Not applicable		0	Not applicable		0
Annual						
Statement						
			0			0
	Subtotal of Estimated Cost		\$	Subtotal of Estimated Cost		\$

Part III: Supporting Pages – Management Needs Work Statement(s)				
Work Statement for Year 1 FFY _____	Work Statement for Year <u>2</u> FFY 2011		Work Statement for Year: <u>3</u> FFY 2012	
	Development Number/Name General Description of Major Work Categories	Estimated Cost	Development Number/Name General Description of Major Work Categories	Estimated Cost
See				
Annual Statement	Not applicable	0	Not applicable	0
	Subtotal of Estimated Cost	\$ 0	Subtotal of Estimated Cost	\$ 0

Capital Fund Program—Five-Year Action Plan

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 4/30/2011

Part III: Supporting Pages – Management Needs Work Statement(s)				
Work Statement for Year 1 FFY _____	Work Statement for Year <u>4</u> FFY <u>2013</u>		Work Statement for Year: <u>5</u> FFY <u>2014</u>	
	Development Number/Name General Description of Major Work Categories	Estimated Cost	Development Number/Name General Description of Major Work Categories	Estimated Cost
See				
Annual Statement	Not applicable	0	Not applicable	0
	Subtotal of Estimated Cost	\$ 0	Subtotal of Estimated Cost	\$ 0

Annual Statement/Performance and Evaluation Report
 Capital Fund Program, Capital Fund Program Replacement Housing Factor and
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226
 Expires 4/30/2011

Part I: Summary					
PHA Name: Punta Gorda Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14S5060501-09 Replacement Housing Factor Grant No: Date of CFFP: _____			FFY of Grant: 2009 FFY of Grant Approval:
Type of Grant <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no:2) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost ¹	
		Original	Revised ²	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations (may not exceed 20% of line 21) ³				
3	1408 Management Improvements				
4	1410 Administration (may not exceed 10% of line 21)	5,709.00	4,503.85	4,503.85	4,503.85
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	4,500.00	0.00	0.00	0.00
8	1440 Site Acquisition				
9	1450 Site Improvement	46,878.00	52,583.15	52,583.15	52,583.15
10	1460 Dwelling Structures				
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Non-dwelling Structures				
13	1475 Non-dwelling Equipment				
14	1485 Demolition				
15	1492 Moving to Work Demonstration				
16	1495.1 Relocation Costs				
17	1499 Development Activities ⁴				
18a	1501 Collateralization or Debt Service paid by the PHA				
18ba	9000 Collateralization or Debt Service paid Via System of Direct Payment				
19	1502 Contingency (may not exceed 8% of line 20)				
20	Amount of Annual Grant: (sum of lines 2 – 19)	57,087.00	57,087.00	57,087.00	57,087.00
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Section 504 Activities				
23	Amount of line 20 Related to Security – Soft Costs				
24	Amount of line 20 Related to Security – Hard Costs				
25	Amount of line 20 Related to Energy Conservation Measures				

¹ To be completed for the Performance and Evaluation Report.

² To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

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⁴ RHF funds shall be included here.

Annual Statement/Performance and Evaluation Report
 Capital Fund Program, Capital Fund Program Replacement Housing Factor and
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 Expires 4/30/2011

Part I: Summary					
PHA Name: Punta Gorda Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14S5060501-09 Replacement Housing Factor Grant No: Date of CFFP: _____		FFY of Grant: 2009 FFY of Grant Approval: _____	
Type of Grant <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost ¹	
		Original	Revised ²	Obligated	Expended
Signature of Executive Director <i>Jean Garza</i>		Date 12/10/2009		Signature of Public Housing Director Date	

Part II: Supporting Pages								
PHA Name:		Grant Type and Number		CFFP (Yes/ No):		Federal FFY of Grant:		
		Capital Fund Program Grant No:						
		Replacement Housing Factor Grant No:						
Development Number Name/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised ¹	Funds Obligated ²	Funds Expended ²	
Oak Tree Village FL060-002 (part)	Sitework including new property ID sign, playground equipment resodding, dead tree removal and new landscapint	1450		46,878.00	52,583.15	52,583.15	52,583.15	Complete
Oak Tree Village FL060-002	Administrative activities including vendor procurement and Contract oversite	1410		5,709.00	4,503.85	4,503.85	4,503.85	Complete
Oak Tree Village FL060-002	Physical Needs Assessment	1430		4,500.00	0.00	0.00	0.00	

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U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
Expires 4/30/2011

² To be completed for the Performance and Evaluation Report.

PHA Name:

Federal FFY of Grant:

[illegible]

¹ Obligation and expenditure end dated can only be revised with HUD approval pursuant to Section 9j of the U.S. Housing Act of 1937, as amended.